Alberta Tourism Market Monitor

Solid growth in visitation indicates 2016 a good year for Mountain National Parks in Alberta

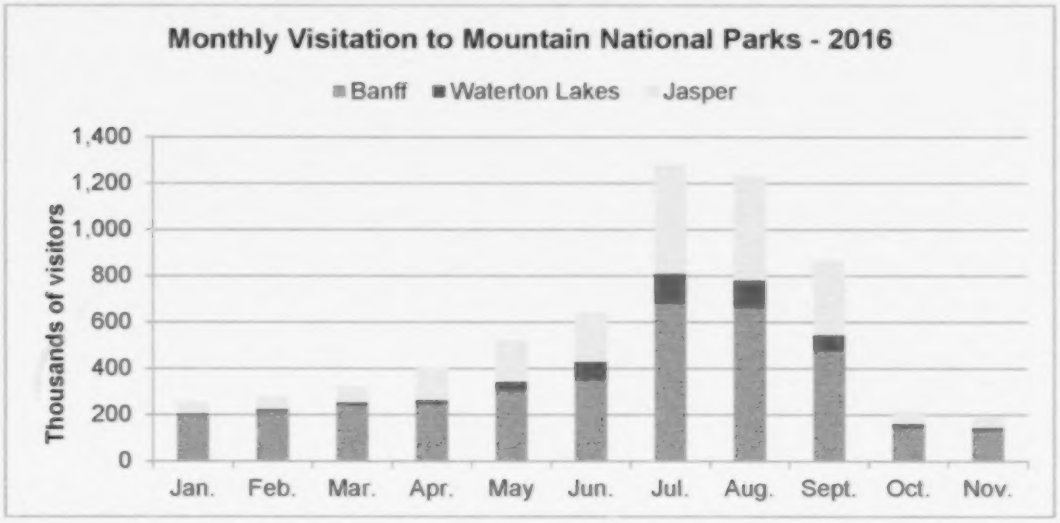
On average, Banff National Park receives more than half of all visitors to Alberta's mountain parks. In 2016, between January and November, more than 3.6 million visitors choose to visit Banff National Park. That's a 6.6% increase compared to the same period in 2015.

For more information please contact Emily Wang at tourism.research@gov.ab.ca or 780-427-6206

Jasper National Park welcomed more than 2 million visitors, an increase of 4% over January to November 2015. In addition, visitation to Waterton Lakes National Park totaled 530,400 from January to November 2016, an increase of 13.1% over the same months in 2015.

Looking at the numbers for November 2016 over 2015, both Banff and Jasper national parks had significant increases. Banff National Park increased by double digits to 12.7%, while Jasper National Park welcomed an estimated 15,000 more visitors for a total 132,000 visitors.

In celebration of Canada's 150 years of Confederation, entry to all national parks is free in 2017. It is expected that all five national parks in Alberta could see higher visitation numbers, especially during the summer months. This may increase demand for accommodations in the parks and surrounding areas during this time.



Alberta Government

2016 Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2016 (000's of arrivals and departures) [1]													
Edmonton International Total	602.7r	554.2r	578.3r	534.5p	592.0p	583.4p	645.0p	669.5p	588.9p	586.1p	**541.0p**		**6,435.9p**
Per cent change from 2015	-6.8%	-1.3%	-5.8%	-9.8%	-2.7%	-2.5%	-5.6%	-5.7%	-2.2%	-1.5%	**-1.8%**		**-3.3%**
Domestic	400p	397.9p	426.7p	399.5p	492.7p	497.6p	559.1p	586.2p	503.7p	491.7p	**421.2p**		**5,176.4p**
Per cent change from 2015	0.5%	4.5%	1.3%	-3.4%	12.3%	1.4%	-0.1%	0.5%	2.1%	4.1%	**3.9%**		**2.3%**
Transborder	97p	95.2p	95.5p	85.7p	70.5p	63.0p	60.2p	57.2p	61.7p	72.3p	**78.4p**		**836.9p**
Per cent change from 2015	-18.0%	-20.5%	-26.1%	-28.2%	-25.9%	-23.3%	-35.6%	-38.9%	-24.0%	-25.5%	**-21.0%**		**-25.8%**
International	65.4p	61.1p	56.1p	49.3p	28.8p	22.8p	25.7p	26.1p	23.4p	22.2p	**41.4p**		**422.6p**
Per cent change from 2015	-0.5%	0.2%	-11.2%	-17.8%	-9.1%	-10.5%	-16.1%	-20.8%	-14.4%	-13.3%	**-10.3%**		**-10.0%**
Calgary International Total	1,205.9r	1,193.5p	1,304.2p	1,198.6p	1,257.9r	1,322.1r	1,549.5r	1,562.9r	1,343.3p	**1284.7r**	**1155.5p**		**14377.7p**
Per cent change from 2015	0.5%	3.8%	2.9%	-2.2%	0.1%	1.3%	2.4%	0.4%	3.7%	**1.4%**	**1.0%**		**1.4%**
Domestic	810.9r	810.7p	892.5p	836.6p	920.9r	966.9r	1,122.6r	1,140.8r	979.6p	**943.4r**	**812.3p**		**10,237.2p**
Per cent change from 2015	1.2%	5.9%	6.3%	-0.9%	1.2%	1.2%	2.0%	-0.2%	3.1%	**1.5%**	**-0.2%**		**1.8%**
Transborder	236.3p	237p	263.2p	222.2p	225.3p	241.0p	290.5p	284.8r	246.5p	**240.2r**	**220.6p**		**2,707.7p**
Per cent change from 2015	-7.2%	-6.5%	-6.3%	-11.8%	-5.2%	-1.0%	1.3%	-0.2%	1.8%	-1.8%	**-1.1%**		**-3.4%**
International	158.6p	145.8p	148.6p	139.8p	111.7p	114.1p	136.4p	137.3r	116.9r	101.1p	**122.6p**		**1,432.8p**
Per cent change from 2015	10.3%	11.5%	1.4%	8.2%	1.9%	7.5%	9.1%	7.0%	13.3%	8.2%	**14.5%**		**8.3%**
Fort McMurray International Total	67.9p	71.0p	76.4p	72.2p	9.8p*	46.2p	70.8p	74.2p	66.9p	66.7p	**63.3p**		**685.4p**
Per cent change from 2015	-30.3%	-21.9%	-21.5%	-22.9%	-89.4%	-53.0%	-27.4%	-24.4%	-28.7%	-23.7%	**-20.4%**		**-33.2%**
Highway Count 2016 (000's of vehicles) [2]													
Hwy 1 -Sask border w-bound	57.1	57.5	71	67.2	79.2	83.5	113.5	108.8	84.9	**77.7**	**67.4**		**867.8**
Per cent change from 2015	-1.0%	0.4%	9.7%	-7.7%	-1.1%	-2.2%	2.2%	-0.5%	4.9%	**-3.2%**	**4.7%**		**0.4%**
Hwy 1 - Banff Pk Gate (2-way)	542.1	550.8	626.1	573.6	685.7	741.1	1,031.4	1,014.10	758.6	**563.7**	**527.3**		**7,614.5**
Per cent change from 2015	8.0%	9.0%	15.0%	1.0%	1.0%	5.0%	8.2%	3.7%	9.3%	**-4.5%**	**12.7%**		**5.9%**
Hwy 16 - Jasper Pk Gate (2 way)	90.1	89	118.8	114.4	149.1	173.6	254.6	249.4	168.7	**112.0**	**83.8**		**1,407.7**
Per cent change from 2015	-6.4%	-4.1%	6.4%	-7.3%	-0.1%	3.4%	8.9%	-1.9%	4.3%	**-10.5%**	**-0.7%**		**-12.1%**
Hwy 16 - Blackfoot w-bound	143.9	139.2	160.3	160.8	174.8	175.2	186.2	188.9	173.4	**167.8**	**162.2**		**1,502.7**
Per cent change from 2015	-12.3%	-5.0%	-6.2%	-9.6%	-6.3%	-7.0%	-8.1%	-4.0%	-3.3%	**-9.5%**	**0.1%**		**-23.4%**
National Park Attendance (000's of visitors) 2016 [3] Does not include Group Tours													
Banff	196.6	212.2	239.1	242.6	300.5	349.5	680.4	659.5	475.2	142.0	131.5		3,629.1
Per cent change from 2015	6.3%	12.5%	17.3%	-1.7%	1.4%	7.2%	7.9%	4.5%	9.7%	-2.6%	12.7%		6.6%
Jasper	51.0	55.2	71.6	140.3	180.3	211.3	468.2	453.1	319.4	56.1	43.3		2,049.8
Per cent change from 2015	-3.4%	3.0%	11.7%	-4.6%	1.2%	5.2%	8.1%	1.8%	7.7%	-8.2%	4.3%		3.8%
Waterton Lakes	8.5	11.5	13.1	19.6	41.9	80.0	130.7	122.3	69.6	20.0	13.2		530.4
Per cent change from 2015	26.9%	53.3%	40.9%	32.4%	6.9%	8.8%	14.3%	7.2%	16.6%	-9.0%	67.1%		13.1%
Elk Island	13.8	16.2	19.4	27.9	36.0	40.1	54.1	52.8	38.1	20.1	14.3		332.8
Per cent change from 2015	43.8%	79.7%	31.2%	42.9%	-8.6%	11.2%	29.0%	10.3%	20.1%	-18.6%	-28.1%		13.0%
Wood Buffalo	n/a	n/a	n/a	0.05	0.50	0.54	0.95	0.81	0.40	0.02	0.02		3.29
Per cent change from 2015	n/a	n/a	n/a	193.8%	42.9%	27.4%	8.3%	-18.8%	13.8%	-32.4%	63.6%		7.1%

Sources: Edmonton International Airport, Calgary International Airport, Fort McMurray International Airport, Alberta Transportation, Parks Canada.

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Employment (000's of persons) 2016 Seasonally Adjusted[1]													
Accommodation and Food Services	138p	135.7p	138.6p	141.0p	141.1p	146.9p	145.3p	151.2p	150.9p	148.9p	148.4p	**147.0p**	**144.4p**
Per cent change from 2015	-12.0%	-13.7%	-11.1%	-8.1%	-10.0%	-6.6%	-5.6%	-1.9%	1.1%	-2.2%	-0.3%	**4.4%**	**-5.7%**
Accommodation Indices for Major Regions 2016[3]													
Edmonton Occupancy Rate	49.7%	59.0%	61.0%	60.7%	74.7%	61.8%	59.2%	60.1%	60.2%	60.2%	**60.1%**		**60.6%**
Point change from 2015	-5.0	-6.7	-6.2	-7.3	10.5	-8.0	-5.7	-4.1	-4.4	-2.6	**-1.9**		**-3.8**
Average Daily Room Rate	$128.02	$131.88	$131.91	$130.77	$124.87	$130.17	$127.5	$127.57	$128.14	$131.27	**$134.32**		**$130.06**
Variance from 2015	-5.0%	-4.3%	-5.0%	-4.9%	-8.6%	-7.0%	-4.5%	-4.9%	-6.9%	-4.1%	**-2.7%**		**-4.9%**
Revenue per available room	$63.58	$77.83	$80.46	$79.38	$93.28	$80.51	$75.43	$76.63	$77.18	$79.04	**$80.79**		**$78.83**
Calgary Occupancy Rate	45.8%	50.9%	53.5%	56.4%	63.2%	67.8%	78.1%	70.8%	67.5%	55.6%	**53.3%**		**60.3%**
Point change from 2015	-9.4	-11.1	-10.2	-8.3	-6.5	-2.3	0.0	-5.0	-3.0	-7.6	**-1.4**		**-5.9**
Average Daily Room Rate	$138.84	$138.98	$137.57	$142.24	$139.55	$157.87	$167.43	$136.14	148.33	$141.19	**$145.72**		**$146.71**
Variance from 2015	-10.4%	-10.7%	-12.1%	-8.6%	-12.1%	-7.7%	-8.2%	-7.4%	-5.7%	-9.1%	**-5.1%**		**-8.1%**
Revenue per available room	$63.63	$70.69	$73.65	$80.23	$88.23	$107.03	$130.71	$96.42	$100.19	$78.51	**$77.73**		**$88.44**
Alberta Resorts Occupancy Rate	42.5%	53.9%	55.4%	46.8%	63.5%	83.4%	93.1%	93.9%	87.5%	57.4%	**41.4%**		**65.8%**
Point change from 2015	1.6	0.5	5.6	-1.6	3.4	6.5	2.5	1.9	5.3	-1.3	**3.5**		**2.5**
Average Daily Room Rate	$184.26	$195.28	$195.40	$180.42	$213.16	$279.58	$335.54	$332.47	$283.97	$203.64	**$184.25**		**$251.92**
Variance from 2015	0.9%	10.7%	14.3%	5.8%	7.0%	9.1%	15.5%	12.3%	10.3%	7.4%	**10.7%**		**10.1%**
Revenue per available room	$78.40	$105.22	$108.31	$84.36	$135.40	$235.58	$312.41	$312.04	$248.52	$116.94	**$76.25**		**$165.76**
Other Alberta** Occupancy Rate	35.3%	39.6%	40.4%	39.2%	42.4%	48.3%	51.6%	52.1%	50.2%	45.5%	**43.6%**		**44.2%**
Point change from 2015	-17.1	-15.9	-12.7	-9.8	-8.7	-10.3	-6.9	-4.8	-5.4	-5.0	**-2.0**		**-9.1**
Average Daily Room Rate	$122.20	$123.10	$120.47	$116.27	$113.49	$123.76	$123.52	$121.13	$118.23	$116.45	**$117.56**		**$119.72**
Variance from 2015	-9.0%	-7.8%	-8.3%	-10.4%	-10.7%	-3.7%	-4.5%	-5.9%	-7.5%	-7.6%	**-7.2%**		**-7.5%**
Revenue per available room	$43.09	$48.69	$48.70	$45.62	$48.15	$59.78	$63.74	$63.07	$59.37	$52.98	**$51.29**		**$52.91**
Total Alberta (excl. Resorts) Occupancy Rate	42.4%	48.3%	49.9%	50.3%	57.6%	58.0%	61.7%	60.0%	58.2%	52.6%	**51.2%**		**53.6%**
Point change from 2015	-11.5	-12.1	-10.4	-8.8	-2.8	-7.2	-4.5	-4.6	-4.3	-5.2	**-1.8**		**-6.7**
Average Daily Room Rate	$129.50	$131.06	$129.79	$129.88	$126.09	$137.81	$141.35	$128.30	$131.68	$129.03	**$132.01**		**$132.09**
Variance from 2015	-8.0%	-7.5%	-8.5%	-7.7%	-10.5%	-5.4%	-5.2%	-6.1%	-6.3%	-7.1%	**-4.8%**		**-6.7%**
Revenue per available room	$54.94	$63.24	$64.82	$65.35	$72.64	$79.94	$87.26	$76.97	$76.70	$67.86	**$67.60**		**$70.78**
Sources: Statistics Canada, CBRE Hotels Trends in the Hotel Industry National Market Report.													

Accommodation Indices for Selected Cities or Towns 2016 [6]													
Occ%= Occupancy Rate **ADR**= Average Daily Room Rate **RevPar**= Revenue Per Available Room	November			Year-To-Date				November			Year-To-Date		
	Occ%	ADR	RevPar	Occ%	ADR	RevPar		Occ%	ADR	RevPar	Occ%	ADR	RevPar
Airdrie	35.9%	$101.30	$36.33	45.9%	$104.97	$48.19	Banff	50.3%	$165.40	$83.17	72.6%	$213.84	$155.27
Bonnyville	32.3%	$109.22	$35.25	33.3%	$108.03	$35.96	Canmore	36.5%	$114.64	$41.79	61.4%	$156.22	$95.88
Drayton Valley	41.2%	$111.62	$45.94	31.3%	$114.16	$35.76	Drumheller	22.2%	$118.39	$26.34	40.5%	$136.16	$55.10
Edson	52.0%	$112.77	$58.68	49.5%	$114.18	$56.46	Fort Mac	48.8%	$144.99	$70.72	47.6%	$154.22	$73.34
Fort Saskatchewan	41.7%	$113.83	$47.47	47.6%	$116.37	$55.38	Gr. Prairie	53.7%	$125.10	$67.17	50.0%	$129.65	$64.89
High Level	33.4%	$123.34	$41.17	40.5%	$124.77	$50.57	Hinton	27.5%	$95.85	$26.32	48.7%	$125.00	$60.86
Innisfail	32.4%	$79.10	$25.60	33.1%	$83.80	$27.70	Jasper	35.1%	$151.56	$53.18	66.2%	$220.12	$145.80
Leduc	50.8%	$98.52	$50.03	51.5%	$101.54	$52.33	Lethbridge	46.0%	$106.64	$49.03	50.7%	$107.27	$54.38
Lloydminster	43.2%	$110.35	$47.63	45.4%	$115.18	$52.29	Med. Hat	59.4%	$111.15	$66.06	56.5%	$107.65	$60.87
Nisku	55.5%	$98.07	$54.43	54.3%	$100.96	$54.78	Red Deer	45.5%	$111.73	$50.82	41.5%	$107.61	$44.64
Sherwood Park	40.5%	$127.21	$51.48	45.4%	$127.92	$58.12	Whitecourt	39.6%	$115.68	$45.81	35.0%	$113.10	$39.63
Total Alberta	50.1%	$135.25	$67.72	55.7%	$147.91	$82.36							
	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Food Services and Drinking Places 2016 ($ Millions) unadjusted [7]													
Total Receipts for Alberta	671.64r	663.95r	730.00r	742.74r	774.33r	753.86r	774.81r	778.74r	753.23r	764.91p			743.36p
Per cent change from 2015	-2.6%	0.9%	-1.5%	1.7%	0.4%	-0.3%	-1.3%	0.5%	1.5%	0.7%			0.2%
Historic Sites and Museums 2016 (000's of visitors) [8]													
Visitor Attendance***	10.6p	26.4p	36.3p	33.6p	66.8p	84.3	190.0r	170.3p	63.0p	29.6p	21.7p	10.7p	743.3p
Per cent change from 2015	-6.2%	14.3%	4.0%	-3.4%	6.4%	-3.1%	10.2%	-10.7%	0.0%	-8.7%	25.4%	-6.1%	-12.9%
Exchange Rates 2016 [9]													
Canadian Dollar/U.S. Dollar (noon)	0.70	0.72	0.76	0.78	0.77	0.78	0.77	0.77	0.76	0.75	0.74	0.75	0.75
Canadian Dollar/ Euro	0.65	0.65	0.68	0.69	0.68	0.69	0.69	0.69	0.68	0.69	0.69	0.71	0.68
Canadian Dollar/ Great British Pounds	0.49	0.51	0.53	0.54	0.53	0.55	0.58	0.59	0.58	0.61	0.60	0.60	0.56
Oil Price: Western Texas Intermediate (WTI) 2016 [10]													
Cushing, OK Spot Price (US Dollar per Barrel)	31.68	30.32	37.55	40.75	46.83	48.76	44.65	44.72	45.18	49.78	45.71	51.97	43.15
Major Tourism Projects Valued $5 million or Greater 2016 ($ Millions) [11]													
Total Value of Hotel Projects Inventory	$899	$1,102	$1,177	$799	$773	$773	$773	$764	$758	$666	$666		$666
Sources: STR Inc, Statistics Canada, Alberta Culture, Bank of Canada, WTI, Government of Alberta.													

*Commercial Air Service suspended from May 5-June 10 due to wildfire

**Other Alberta includes Lethbridge, Red Deer, and other Alberta communities.

***Please note some of the historical sites have changed their hours of operation - see Notes section for details.

Note: New monthly figures are shown in bold type. Revisions will be bolded.
r=revised p=preliminary

1. Air Passengers - Numbers are preliminary estimates of air passenger arrivals and departures at the Edmonton International and Calgary International Airports. From September 2015, total domestic passengers at Fort McMurray International Airport have been added.
Source: Edmonton International Airport, Calgary International Airport and Fort McMurray International Airport Websites.

2. Highway Traffic: These are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year-to-date is a cumulative total for all vehicles.
Source: Alberta Transportation's Automatic Traffic Recorders (ATR). http://www.transportation.alberta.ca/3459.htm

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. The tour group data are included in the annual edition of the Market Monitor.
Source: Parks Canada.

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay or profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.
Source: Statistics Canada, Labour Force Survey.

5. Accommodation Indices for Major Regions - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Revenue per available room is calculated using the occupancy rate and average daily room rate.

Source: CBRE Hotels Trends in the Hotel Industry National Market Report, with reproduction and use of information subject to CBRE Disclaimer and Restrictions as detailed at www.cbre.ca

6. Accommodation indices for Selected Cities or Towns- Destination reports are publications of Smith Travel Research Inc. (STR). Terms and conditions governing the ownership, distribution and use of these Destination Reports and their contents include that no historic data can be published, only current month and year-to-date data.
Source: STR Inc.

7. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places.

8. Historic Sites and Museums - Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Tyrrell Museum of Paleontology and the Tyrrell Field Station. **The Royal Alberta Museum closed on December 6, 2015.
Source: Alberta Culture

9. Exchange Rate- this is the average monthly exchange rate.
Source: Bank of Canada.

10. Western Texas Intermediate - This is the average monthly oil price.
Source: Cushing, OK WTI Spot Price FOB.

11. Major hotel projects in Alberta - This is the inventory of hotel projects in Alberta, including new hotels and renovations valued at $5 million or greater. It is not a complete list of hotel projects. The project stages included in the reported number are: announced, under construction and completed. If the project is completed, it will be removed from the inventory after 30 days from completion. More information on other tourism and recreation projects is available on the website provided below.
Source: Government of Alberta. http://majorprojects.alberta.ca/

20-Jan-2017